The parties are reminded of their obligations under Fed. R. Civ. P. 26(a)(1) to make 1 initial disclosures without awaiting a discovery request, and under Fed. R. Civ. P. 2 26(f) to confer on a discovery plan by 21 days before the Scheduling Conference. 3 The Court encourages counsel to agree to begin to conduct discovery actively 4 before the Scheduling Conference. At the very least, the parties shall comply fully 5 with the letter and spirit of Fed. R. Civ. P. 26(a) and thereby obtain and produce 6 7 most of what would be produced in the early stage of discovery, because at the Scheduling Conference the Court will impose strict deadlines to complete 8 discovery. 9 10

## Joint Rule 26(f) Report I.

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The Joint Rule 26(f) Report must be filed by 14 days before the Scheduling Conference. A chambers copy of the Joint Rule 26(f) Report must be delivered to Judge Birotte's chambers copy box outside the Clerk's Office on the fourth floor of the courthouse by 12:00 p.m. (noon) the following business day.

The Report shall be drafted by plaintiff (unless the parties agree otherwise), but shall be submitted and signed jointly. "Jointly" means a single report, regardless of how many separately-represented parties there are. The Joint Rule 26(f) Report shall specify the date of the Scheduling Conference on the caption page. It shall report on all matters described below, as specified by Fed. R. Civ. P. 26(f) and Local Rule 26:

- Statement of the Case: A short synopsis (not to exceed two pages) of the main claims, counterclaims, and affirmative defenses.
- Subject Matter Jurisdiction: A statement of the specific basis of federal b. jurisdiction, including supplemental jurisdiction. If there is a federal question, cite the federal law under which the claim arises.
- <u>Legal Issues</u>: A brief description of the key legal issues, including any unsual substantive, procedural or evidentiary issues.
- Parties, Evidence, etc.: A list of parties, percipient witnesses, and key

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- statement Conference / Alternative Dispute Resolution ("ADR"): A statement of what settlement discussions have occurred (excluding any statement of terms discussed). If a Notice to Parites of Court-Directed ADR Program (Form ADR-08) was filed in this case, the Court will refer it to the magistrate judge, the Court Mediation Panel, or to private mediation (at the parties' expense). The parties must indicate their preference in their Joint Rule 26(f) Report. No case will proceed to trial unless all parites, including an officer with full settlement authority for corporate parties, have appeared personally at an ADR proceeding.
- o. <u>Trial Estimate</u>: A realistic estimate, in days, of the court time required for trial and whether trial will be by jury or by court. Each side should specify (by number, not by name) how many witnesses it contemplates calling. If the time estimate for trial given in the Joint Rule 26(f) Report exceeds four court days, counsel shall be prepared to discuss in detail the basis for the estimate.
- p. <u>Trial Counsel</u>: The name(s) of the attorney(s) who will try the case.
- q. Independent Expert of Master: Whether this is a case in which the Court should consider appointing a master pursuant to Fed. R. Civ. P. 53 or an independent scientific expert. (The appointment of a master may be especially appropriate if there are likely to be substantial discovery disputes, numerous claims to be construed in connection with a summary judgment motion, a lengthy *Daubert* hearing, a resolution of a difficult computation of damages, etc.).
- r. <u>Schedule Worksheet</u>: Complete the Schedule of Pretrial and Trial Dates Worksheet ("Worksheet") attached to this Order and include it with your Joint Rule 26(f) Report. The parties <u>MUST</u> submit a completed Worksheet with their Joint Rule 26(f) Report. The Court <u>ORDERS</u> the parties to make every effort to agree on dates. The entries in the "Weeks

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Before FPTC" column reflect what the Court believes is appropriate for most cases and will allow the Court to rule on potentially dispositive motions sufficiently in advance of the Final Petrial Conference. However, counsel may ask for earlier last dates by which the key requirements must be completed. Each date should be stated as month, day, and year, e.g., 10/15/2019. Hearings shall be on Fridays at 10:00 a.m. Other deadlines (those not involving the Court) can be any day of the week. Counsel must avoid holidays. The Court may order different dates than those requested. The discovery cut-off date is the last day by which all depositions must be completed, responses to previously-served written discovery must be provided, and motions concerning discovery disputes must be heard. The cut-off date for motions is the last date on which motions may be **heard**, not filed. If the parties wish the Cour to set dates in addition to those on the Worksheet, they may so request by a separate Stipulation and Proposed Order. This is often appropriate for class actions, patent cases, and ERISA cases.

s. Other issues: A statement of any other issues affecting the status or management of the case (e.g., unusually complicated technical or technological issues, disputes over protective orders, extraordinarily voluminous document production, non-English speaking witnesses, ADA-related issues, discovery in foreign jurisdiction, etc.) and any proposals concerning severance, bifurcation, or other ordering of proof.

The Joint Rule 26(f) Report should set forth the above-described information under section headings corresponding to those in this Order.

## II. Scheduling Conference

- a. <u>Continuance</u>: A request to continue the scheduling conference will be granted only for good cause.
- b. <u>Vacating the Scheduling Conference</u>: The Court often vacates the

## SCHEDULE OF PRETRIAL AND TRIAL DATES WORKSHEET

Please complete this worksheet jointly and file it with your Joint Rule 26(f) Report.

The Court ORDERS the parties to make every effort to agree on dates.

Case No.	Case Name:				
Trial and Final Pretrial Conference Dates			PI(s)' Date mm/dd/yyyy	Def(s)' Date mm/dd/yyyy	Court Order mm/dd/yyyy
Check one: [ ] Jury Trial or [ ] Court Trial ( <u>Tuesday</u> at 8:30 a.m., within 18 months after Complaint fill Estimated Duration: Days					[ ] Jury Trial [ ] Court Trial Days
Final Pretrial Conference ("FPTC") [L.R. 16], Hearing on Motions In Limine (Friday at 11:00 a.m., at least 17 days before trial)					
Event <sup>1</sup> Note: Hearings shall be on Fridays at 10:00 a.m. Other dates can be any day of the week.		Weeks Before FPTC	PI(s)' Date mm/dd/yyyy	Def(s)' Date mm/dd/yyyy	Court Order mm/dd/yyyy
Last Date to <u>Hear Motion to Amend Pleadings/Add Parties</u> [Friday]					
Non-Expert Discovery Cut-Off (no later than deadline for <i>filing</i> dispositive motion)		17			
Expert Disclosure (Initial)					
Expert Disclosure (Rebuttal)					
Expert Discovery Cut-Off		12 <sup>2</sup>			
<ul> <li>Last Date to <u>Hear</u> Motions [Friday]</li> <li>Rule 56 Motion due at least 5 weeks before hearing</li> <li>Opposition due 2 weeks after Motion is filed</li> <li>Reply due 1 week after Opposition is filed</li> </ul>		12			
Deadline to Complete Settlement Conference [L.R. 16-15] <u>Select one</u> : [ ] 1. Magistrate Judge (with Court approval)		10			[ ] 1. Mag. J. [ ] 2. Panel [ ] 3. Private
Trial Filings (first round)  • Motions in Limine  • Memoranda of Contentions of Fact and Law [L.R. 16-4]  • Witness Lists [L.R. 16-5]  • Joint Exhibit List [L.R. 16-6.1]  • Joint Status Report Regarding Settlement  • Proposed Findings of Fact and Conclusions of Law [L.R. 52] (court trial only)  • Declarations containing Direct Testimony, if ordered (court trial only)		3			
Trial Filings (second round)  Oppositions to Motions In Limine Joint Proposed Final Pretrial Cor [L.R. 16-7]  Joint/Agreed Proposed Jury Instruct Disputed Proposed Jury Instruct Joint Proposed Verdict Forms (ju Joint Proposed Statement of the Proposed Additional Voir Dire Querial only) Evidentiary Objections to Decls. (court trial only)	nference Order ructions (jury trial only) ions (jury trial only) iury trial only) Case (jury trial only) uestions, if any (jury	2			

<sup>&</sup>lt;sup>1</sup> The parties may seek dates for additional events by filing a separate Stipulation and Proposed Order. <u>Class actions and patent and ERISA cases in particular may need to vary from the above.</u>

<sup>&</sup>lt;sup>2</sup> The parties may wish to consider cutting off expert discovery prior to the deadline for *filing* an MSJ.